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20 countries, 20,000 interviews, 2x per year, with 20 day turnaround

We call it **Global @dvisor**,
you call it indispensible!

Agenda Overview

- **The Global @dvisor Provocation**
  - Reputational Risk
- **Methodology**
  - Hear our APPROACH
  - Why ONLINE?
  - Discovering THE INTELLIGAGED™
- **Meet The Intelligaged™**
  - Who are they & why are they important?
  - How can business leaders use them?
- **Global @dvisor's research agenda for the future**

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Provocation

Tilting the Axis on Risk Management

Why Global @dvisor & Why Now

- **More than ever business leaders and global marketers are in need of a navigational map through the dangerous terrain of global reputational risk**

- **Your organization has a reputation that stands for something wherever it operates**
  - Brand, advertising, sponsorship, employees, profits, etc.

- **In today's ever increasing virtual world, your trademark is your best trustmark, and the risk to your reputation is instantaneous, and real**

- **Global @dvisor is unique and vital to you because for the first time it allows you to consider, anticipate, analyze, and understand, the threats and opportunities to your reputation and manage the risk affecting your most prized asset, your Corporate Trustmark…**

Defining Reputational Risk?

- ***Harvard Business Review (February, 2007)***

  Reputational risk is defined as; (1) Resulting from the gap between what is promised and what is ultimately perceived, (2) Changes in opinion demands and the company image offering/positioning, and (3) Problems with internal controls where conflicting messages are communicated to external stakeholders.

- ***Global@dvisor Working Definition (April, 2007)***

  Risk associated with the goodwill and equity of your corporate, government, or organizational "trustmark". People are increasingly turning to trustmarks to sort through today's cluttered marketplace of information. Trustmarks are superseding the trademarks of old, and are viewed as a company's license from the public to operate.

  A company's reputation is impacted by events like pending lawsuits, political scandal, bad product testing, management fraud, products seen to cause public harm, etc. Additionally, reputational risk plays a role in determining the efficiency of an organization's marketing activities. Companies with better reputations have an easier time delivering their marketing message to consumers.

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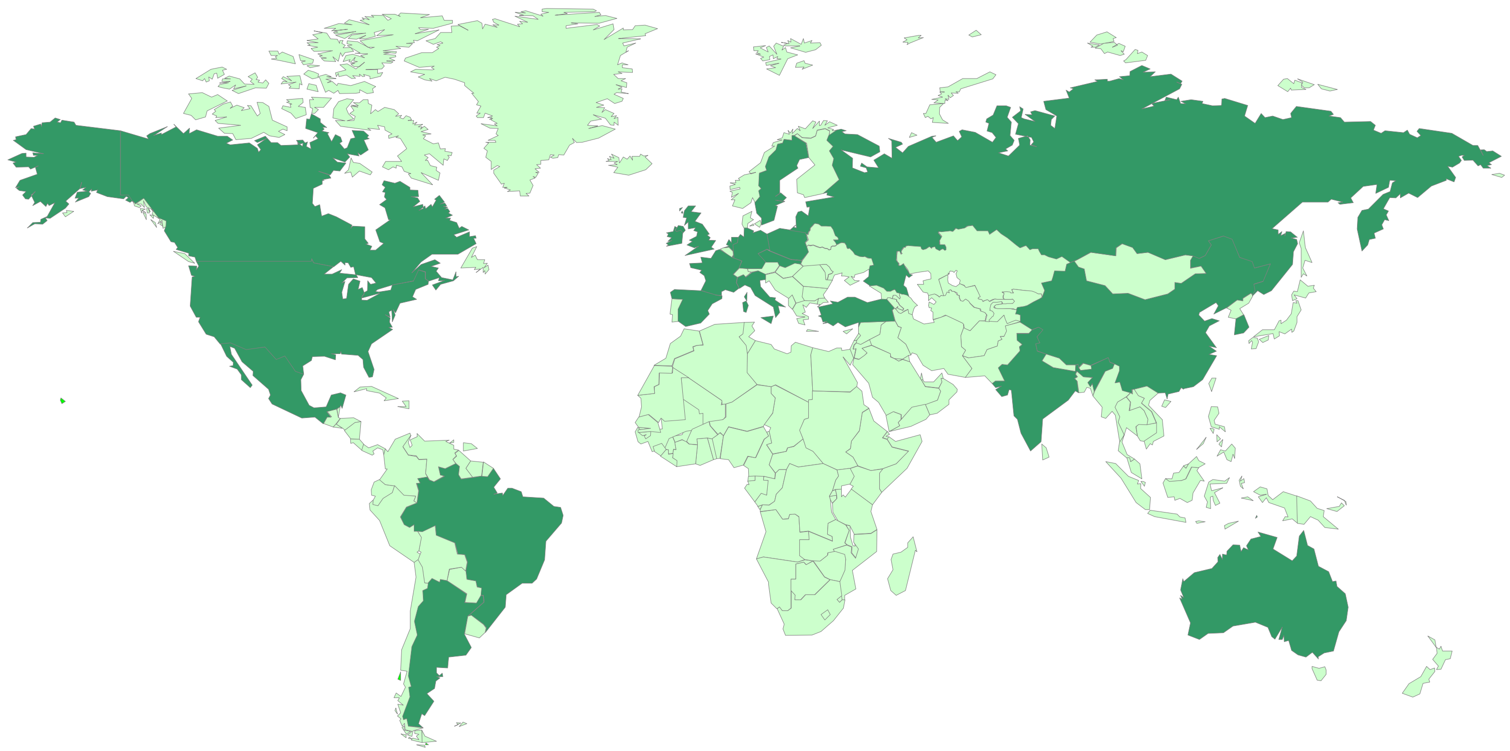
Methodology

Global @dvisor Survey Framework

Methodology - Approach



__20 countries__

US, Canada, Mexico, Brazil, Argentina, UK, France, Germany, Italy, Spain, Sweden, Netherlands, Turkey, Czech Republic, Poland, Russia, India, China, South Korea, and Australia

Countries covered, n=1,000

Methodology – Survey Construct

Global @dvisor

- Social & Political
- Corporate & Business
- Industry Sectors
- Corporate Issues
  - *"Rank & Radar"*
- Activist Profiles
- Media & Internet Profiles
- Benchmarking
  - *Corporate Trustmark's*
- Demographics
  - *Segment Analysis*

Wave 1 – April 2007

Methodology - Approach

- **Survey Frequency**
  - We survey twice per year
    - Wave 1, April
    - Wave 2, October
  - Inaugural wave occurred from April 12th through April 23rd of 2007
  - 11 days in field + 9 days of cleansing & production = 20 day turnaround!
- **Survey length**
  - 10 minutes syndicated and 5 minutes of proprietary “client time”
- **Survey modality**
  - Ipsos online access panels and partnership alliance panels were used to collect the n=1,000 online completes per country.

Methodology – Online Sampling

- **Why ONLINE?**
  - Surveying online was an intentional design to speak and engage with individuals who Marshall Mcluhan called "The New Global Village".
  - We call these individuals ***The Intelligaged™***. They are seminal global citizens who have the greatest force and impact on their surroundings and the players in "The Village".
  - Business leaders and marketers need to hear their voice if they want to get a better understanding of how to manage the Reputational Risk of their corporate trustmark

•Intelligaged™ is a trademark used by Ipsos-Reid Public Affairs, Inc. ("Ipsos Public Affairs") and shall not be reproduced or used in any manner without the prior written consent of Ipsos Public Affairs.

Methodology – Comparative Assessment

- **Global @dvisor embedded questions from three existing survey studies, to demonstrate the differing views, attitudes, and behaviors of The Intelligaged™**
  - PEW Research ***"Global Attitudes Study"*** (F2F in 44 countries)
  - Ipsos Public Affairs ***"G6 Global Study"*** (Phone in 6 countries)
  - Ipsos Technology ***"Face of the Web Global Internet Usage Tracker"*** (Phone in 12 countries)

Intelligent Design

The Intelligaged™

Methodology – Outcome

- **What we found confirmed our beliefs…**
  - High Internet Penetration Countries
    - Closely correlated to Phone & F2F (+/- 5pts on most questions)
    - Usual depression in online results versus these two methodologies
    - Responses track, correlate, and tell consistent and statistically consistent stories across all three methodologies
  - Low Internet Penetration Countries
    - Wide gaps vs. general population on "Agenda Questions"
      - State of economy, optimism, hope, etc.
    - Responses were significantly more optimistic, capitalistic, and showed high degree of on-line commercial activity
- ***Significant finding***
  - Of particular interest to Ipsos was the discovery of The Intelligaged™, a compelling population that share a set of attitudes and beliefs which show considerable Internet Savvy

How do The Intelligaged™ compare to the general population?

The Intelligaged™ are closely correlated, but slightly more pessimistic versus phone results in High Internet penetration countries

- **Question: "When you think about the social & economic future of your country, are you…"**

- **The Intelligaged™ beliefs are in line with traditional phone studies on social issues with slight depression.**

	% Confident				
Country	G@(1)		Ipsos G6 Global Study(2)	+/-	%Internet Penetration
France	15%		20%	- 5pts	50%
US	35%		39%	- 4pts	70%
Italy	23%		26%	- 3pts	52%
Spain	32%		33%	-1pts	44%
UK	32%		32%	-- pts	62%
Germany	36%		29%	7%	61%

(1) Ipsos Public Affairs G@ Study - 2007
(2) Ipsos G6 Global Social Trends Study - 2007

How do The Intelligaged™ compare to the general population?

The Intelligaged™ have "Elite" views in Low Internet penetration countries

- **Question: "Are you satisfied or dissatisfied with the way things are going in your country today?"**

- **The Intelligaged™ hold an extremely optimistic outlook for their country**

	% Satisfied				
BRIC Country	**G@(1)**		**PEW Research Study(2)**	**+/-**	**%Internet Penetration**
India	46%		9%	+37 pts	4%
China	75%		48%	+27 pts	10%
Russia	43%		20%	+23 pts	17%
Brazil	15%		11%	+4 pts	17%

(1) Ipsos Public Affairs G@ Study 2007
(2) PEW Research Global Attitudes Study

How do The Intelligaged™ compare to the general population?

The Intelligaged™ are extremely active Internet users with a high level of business and personal commerce activity

- **Question: "When was the last time you purchased a product or service online using the Internet?"**
- **The Intelligaged™ are connected and commercially active on the Internet**

Country	G@(1)		Ipsos Face of the Web Study(2)	+/-	%Internet Penetration
India	34%		2%	32pts	4%
China	49%		6%	43pts	10%
Russia	34%	2	2%	32pts	17%
Brazil	45%		2%	43pts	17%
Mexico	27%		5%	22pts	19%
France	56%		29%	27pts	50%
Germany	67%		31%	36pts	61%
UK	66%		40%	26pts	62%
So Korea	73%		38%	35pts	67%
Canada	39%		22%	17pts	68%
US	53%		40%	13pts	70%

(1) Ipsos Public Affairs Global @dvisor Study - 2007
(2) Ipsos Technology Face of the Web Global Study - 2007

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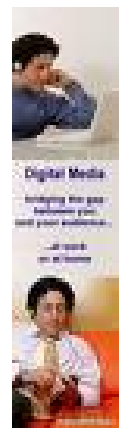
The Intelligaged™

Global @dvisor's Consumer Citizens

Meet the intelligaged™

- **The Rise of the New Knowledge Consumer & Knowledge Citizen …. *The Intelligaged™***







For international business players seeking "permission" to operate... these are the opinion gate-keepers...and the reputation of a company or sector (even a nation like US) can predispose them to a particular position of either granting permission or tightening it...

Meet the Intelligaged™

- **The Intelligaged™ are Global @dvisor's "Canary in the Coalmine"**

  – They are trend setters in thought
  – They are Internet savvy and highly connected
  – They are "Elite" opinion leaders
  – They take strong ethical positions and are politically active

Who are they?

  – They demand choices
  – They hold you accountable
  – They SWITCH trustmarks if their voice isn't heard
  – They are your referenceable audience

Why are they important?

  – Years
  – Months
  – Days
  – Hours

It is hard to tell, but our research shows they can provide greater visibility into your trustmark through their attitudes & beliefs

How far ahead are they?

The Intelligaged™ Global Population

- **<u>Connected & Commerce Driven</u>**
  - 100% are online vs.18% of the world
  - Conducted an online banking transaction in the past 30 days
    - Canada: Intelligaged™ 73% vs. General Population 45% → +28pts
    - Great Britain: Intelligaged™ 67% vs. General Population 36% → +21pts
    - USA: Intelligaged™ 59% vs. General Population 40% → +19pts
- **<u>Political</u>**
  - 68% voted in the last election they were eligible to do so
  - 50% have instigated political, economic and social discussions
  - 37% have signed a petition within the past year.
- **<u>Activists</u>**
  - 47% chose to buy a product/service because of a company's ethical, social or environmental reputation (Italians & French lead the way)
    - Italy: Intelligaged™ 57% vs. General Population 35% → **+22pts**
    - France: Intelligaged™48% vs. General Population 34% → **+14pts**
  - 33% advised others against using a specific company for the same reason
    - Spain: Intelligaged™ 36% vs. General Population 16% → **+20pts**
    - Germany: Intelligaged™ 24% vs. General Population 22% → **+2pts**

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Business Illustration

How can I use The Intelligaged™?

Reputational Risk Measured Globally

Risk is a multi-faceted concept, and there is no shortage of analytical reporting on business risk in today's journals.

However Reputational Risk is a largely unexplored, but vital area for business leaders and marketers to consider.

G@ Risk Assessment

It may vary by country, population segment, sector, and company

- **Country - Geo**
  - BRIC
  - EU
  - LATAM
  - APAC
  - NA

- **Segment**

- **Sector**
  - Financial
  - Consumer
  - Pharma
  - Automotive
  - Telecomm

- **Company**

G@ Risk Assessment

- So we have distilled Reputational Risk and its factors, into a series of easy-to-use Indices, which comprise a "risk dashboard" for senior executives.

- Business Regulation Index
- Rights Protection Index
- Free Enterprise Index
- Environmental Purchasing Index
- Globalism Index
- Optimism Index

- On a global basis, Global @dvisor's ***Business Regulation Index*** poses the greatest risk to your reputation, and in the next few slides we will introduce you to the Indices and explain their importance to your business

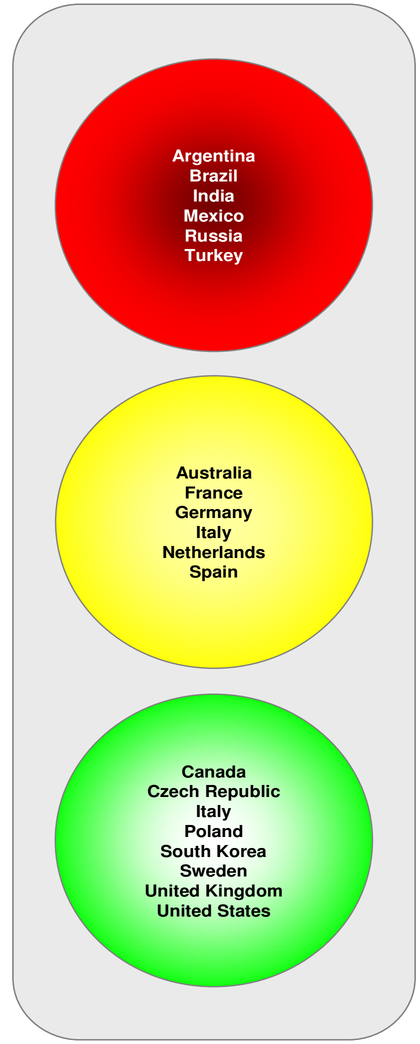
Business Regulation Index – "Trust Busters"

<u>The Business Regulation Index</u> directly assesses the propensity to regulate corporations providing an important indicator of reputational risk.

Global @dvisor's meatiest question:
"The government should be more aggressive in regulating the activities of corporations"

- 3 out of 4 global citizens are in agreement
  - Turkey 89%
  - Russia 88%
  - Mexico 88%
  - Brazil 84%
  - Argentina 82%
  - India 80%

"% of RED Lighters who Agree"



Colors indicate each countries position relative to the global average for the index – Red=significantly higher, Yellow=on par with global average, Green=significantly below

The Intelligaged vs. Business Regulation

- **The Battle of the Consumer Citizen vs. Big Business**

- **Most of the worlds most engaged citizens say they personally embrace global trade and corporate investment in their homeland**

  BUT…

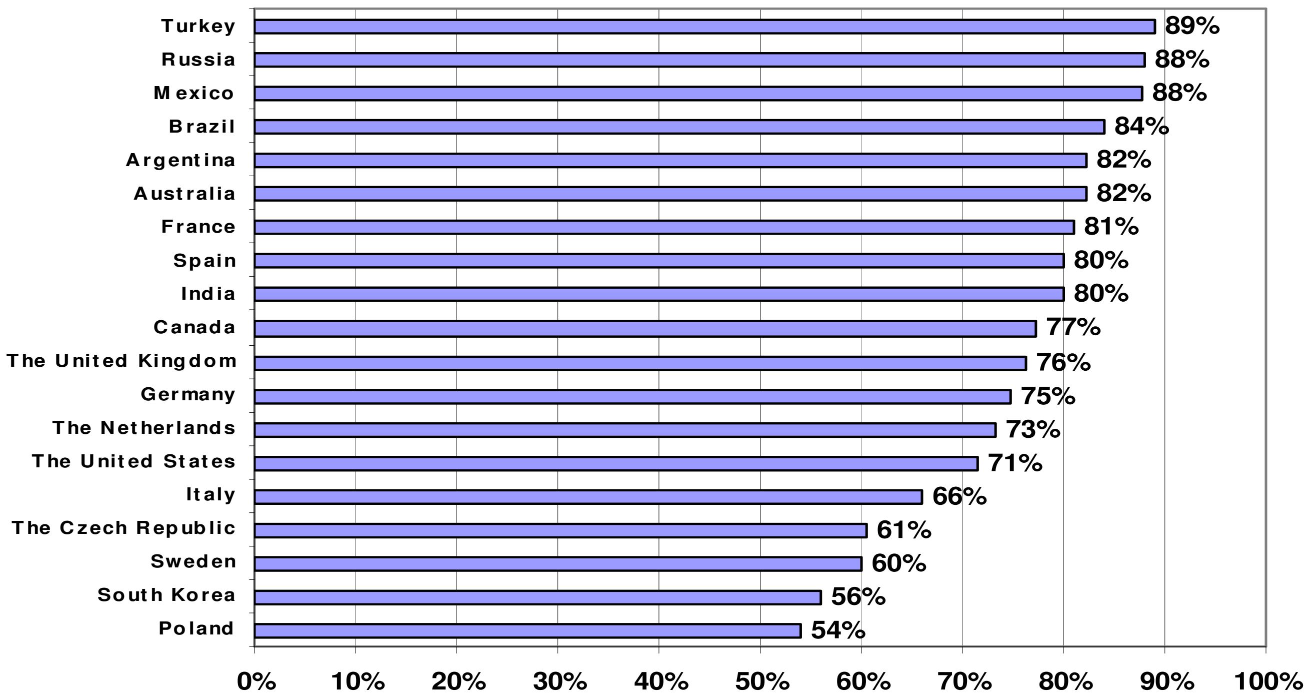
  Want their governments to get more aggressive and crack down on the activities and influence of national and multinational corporations

  – A full majority (71%) of this key audience indicate foreign companies have too much influence over their economy
  – Even more (75%) believe their government should be more aggressive in regulating corporations.

The Intelligaged vs. Business Regulation

- **The Intelligaged™ are highly predisposed to support government regulation across the globe more 50% of all country citizens looking for their government to take action on their behalf…**

Graph 2: Percent that believe the government should regulate Multinational and National Corporations



The Intelligaged vs. Business Regulation

- **However, are The Intelligaged™ speaking out of both sides of their mouths???**

- **Despite their current views on having governments step up controls on companies within their countries, The Intelligaged™ are global trade and corporate investor supporters, and not the expected stereotype.**
  - 91% believe that expanding global trade is a "good" thing
  - 81% advocate that investment by global companies in their country is essential for their growth and expansion
  - Two-thirds (63%) agree that overall, globalization is good for the world.

- **Can The Intelligaged™ have both???**

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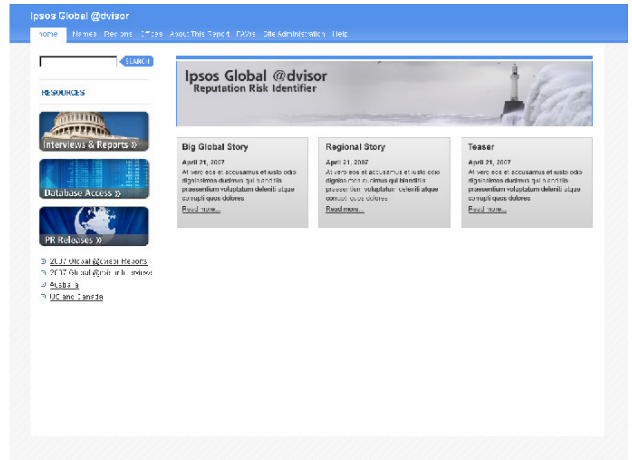
What can clients expect next?

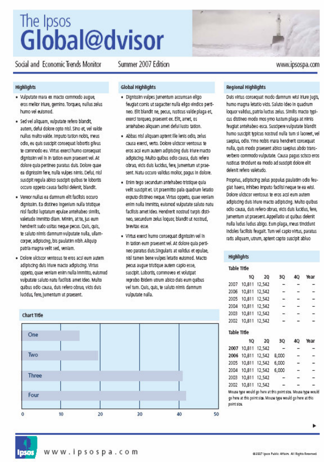
Research agenda for the future

Global @dvisor Research Agenda for the Future

Global @dvisor's future waves?

- Gain access to the only digital portal tracking Global Reputational Risk
- Get visibility into our "6" Risk Indices
  - Business regulation, rights protection, free enterprise, environmental purchasing, gloablism, and optimism
- Have access to The Intelligaged™ and The Intelleventionists™
- Take control of your reputational risk by adding custom proprietary add-on's





Wave 2 Global @dvisor

Schedule

- **Client engagements & custom questions developed**
  - Now through October 15th
- **Fielding date**
  - October 18, 2007
- **Enhancements**
  - Country additions: Japan, Romania, and possibly Colombia
  - Questionnaire additions
    - Environmental, Agenda, sector refinement
  - Custom additions
    - Client dependent
  - Sponsor opportunity
    - Ability to help influence the syndicated content as well as design custom

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Thanks – Merci – Grazie
Arigato – Gracias – Thenk Ye
Cam on – Kiitos – Terima Kasih
Tak – Mahalo – Danke
M goi nei sin
Xie xie